

California Franchise Tax Board

STATE OF CALIFORNIA TAX TECHNICIAN, FTB

OPEN EXAMINATION

SPOT – SACRAMENTO

FRANCHISE TAX BOARD

PO Box 550

Sacramento CA 95812-0550

ATTN: Exam Section, (916) 845-3608

Website: www.ftb.ca.gov

TDD is Telecommunications Device for the Deaf.

California Relay Service

From TDD phone (800) 735-2929

From Voice phone (800) 735-2922

Applicants should be aware that prior to employment with the Franchise Tax Board a background investigation will be conducted. The investigation will consist of completion of a questionnaire, fingerprinting, and inquiry to Department of Justice to disclose criminal records. Employment offers will be made prior to completion of the questionnaire. A commitment to hire will **not** be considered final until the background information has been reviewed and approved by the department.

HOW TO APPLY

Applications are available and can be filed:

In Person:

Franchise Tax Board
9646 Butterfield Way
Exam Section, Room 1024B
Sacramento, CA 95827

By Mail:

ATTN: Exam Section
Franchise Tax Board
PO Box 550
Sacramento, CA 95812-0550

APPLICATIONS MUST CONTAIN ORIGINAL SIGNATURES

SUBMIT APPLICATIONS ONLY TO THE ADDRESS INDICATED ABOVE.

FINAL FILING DATE: October 29, 2004

Applications (Form 678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered or received via interoffice mail after the final filing date will not be accepted for any reason.

If you have a disability and need special testing arrangements, mark the appropriate box in Part 2 of the "Application for Examination." You will be contacted to make specific arrangements.

NOTE: Accepted applicants are required to bring either a photo identification card or two forms of signed identification to each phase of the examination.

QUALIFICATIONS APPRAISAL INTERVIEW

It is anticipated that interviews will be held in January 2005.

SALARY RANGE: A \$2331 - \$2835

SALARY RANGE: B \$2632 - \$3201

Range A – This range will apply to individuals who do not meet the criteria for Range B.

Range B – This range will apply to individuals who have either 1) satisfactorily completed 6 months of experience as a Tax Technician, FTB, Range A, and at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law 2) one year of experience performing duties at a level of responsibility equivalent to Tax Program Technician I, FTB (Taxpayer Services) or 3) the equivalent to graduation from college (four-year degree), which must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law.

ELIGIBLE LIST INFORMATION

An open eligible list will be established for the Franchise Tax Board. Names of successful competitors are merged onto the list in order of final scores, regardless of date. A candidate may **only test once in a 12-month period**. Eligibility expires after 12 months; candidates may then retest to reestablish eligibility.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

Note: All applicants must meet the education and/or experience requirements for this examination by the final filing date.

Qualifying experience may be combined on a proportionate basis if the requirements stated below include more than one pattern and are distinguished as "**Either**" I, "**or**" II, "**or**" III, etc. For example, candidates possessing qualifying experience amounting to 50% of the required time of Pattern I, and additional experience amounting to 50% of the required time of Pattern II, may be admitted to an examination as meeting 100% of the overall experience requirements.

Either I

One year of experience in the California state service performing duties at a level of responsibility equivalent to that of Tax Program Assistant, Range C.

Note: If you are applying under Pattern I, your application should specify length of time at Range C.

Or II

Sixty semester or ninety quarter units of college that must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law. (Persons who will complete the coursework requirements during the current semester or quarter will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment).

Or III

Three years of increasingly responsible experience in a financial, commercial or governmental establishment, at least one year of which shall include one or a combination of activities involving the 1) marketing, distribution and sale of merchandise 2) approval of loans 3) collection on delinquent accounts or 4) contact of client-customer services which involves the explanation of policies, regulations or procedures for a public agency or private institution such as a bank, insurance company, credit bureau or title company.

THE POSITION

A Tax Technician, FTB under general supervision, performs paraprofessional tasks of tax and non-tax law, regulation and policy enforcement. **Collection Program:** analyzes, determines appropriate action and initiates various courses of action on collection accounts; communicates with taxpayers to resolve collection problems; prepares bankruptcy or probate claims and responding to contacts that may be adversary in nature and follows up to assure final resolution. For special procedures, prepares, adjusts and amends or withdraws bankruptcy or probate claims and responds to verbal and written correspondence regarding objections to and rejection of bankruptcy claims. **Call Center/Public Counter functions in Collection, Audit and Filing Programs:** communicates with taxpayers via incoming calls or in person; advises, assists and explains various provisions of laws and regulations administered by the department and in the preparation of individual and corporate tax returns and property tax assistance claims; resolve collection notice problems; handle liability disputes; initiate transactions to correct account errors and modify or release accounts; explain the basis of the liabilities; identify, analyze and release liens; analyze financial statements and recommend payment arrangements; issue assessments for missing years and recommend discharge from accountability. **Audit setting:** performs

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

SEE REVERSE SIDE FOR ADDITIONAL INFORMATION

TAX TECHNICIAN, FTB J198-7505

EXAM CODE: 4FT35

BULLETIN RELEASE DATE: July 21, 2004

FINAL FILING DATE: OCTOBER 29, 2004

TAX TECHNICIAN

desk audits and prepares adjustment notices based on audit findings; communicates with taxpayers to resolve issues developed by the audit; takes appropriate action on protests of adjustment notices based on audit findings; takes appropriate action on protests of adjustment notices and provides technical assistance to other technicians and clerical support staff. **Program Support area:** performs equivalent department's programs. This includes completion of less complex research, analysis, modification and implementation of various legislative proposals, operational changes, forms and quality maintenance procedures and systems used to support and maintain the department's audit and compliance programs.

Positions exist with the Franchise Tax Board in Sacramento.

RECOMPETITION RESTRICTIONS

1. Successful candidates will establish list eligibility for 12 months. Each candidate may only test once in a 12 month period.
2. Unsuccessful candidates who did not meet the minimum qualifications, or were unsuccessful in the exam process may re compete each testing period.

EXAMINATION INFORMATION

This examination will consist of a Qualifications Appraisal Interview. In order to obtain a position on the eligible list, a minimum rating of 70% must be attained in the interview.

Qualifications Appraisal Interview – Weighted 100%

The first portion of the interview will consist of a structured exercise that tests the skills needed to perform the work done by a Tax Technician, FTB. During the interview competitors should be prepared to answer patterned questions relating to areas shown under scope.

COMPETITORS WHO DO NOT APPEAR FOR THE INTERVIEW WILL BE DISQUALIFIED.

Scope:

Knowledge of:

1. Provisions of the rules, regulations, organization and procedures of the Franchise Tax Board.

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2. One or more program areas and applicable tax or non-tax laws.
3. One or more of the functions, applications or processes administered and performed by the Franchise Tax Board.
4. Business and financial practices.
5. Current office methods, technologies and equipment.
6. Mathematics, spelling, grammar, punctuation and modern English usage.

Ability to:

1. Interpret, apply and/or explain provisions of governmental tax or non-tax rules, regulations and departmental procedures and policies.
2. Learn rapidly.
3. Follow directions.
4. Communicate effectively and tactfully with other staff and with the public in person or over the telephone including situations involving difficult, disagreeable and adversarial contacts.
5. Analyze and interpret written and numerical data accurately and adopt an effective course of action.
6. Evaluate situations quickly and accurately and take effective action.
7. Learn to utilize personal computer systems and software applications in the performance of work.
8. Accurately and quickly enter data into a computerized database.
9. Recognize questions or situations outside the employee's area of responsibility or knowledge and refer these to appropriate sources.
10. Write effectively.

Veteran's Preference Credit will be granted in this examination.

Career Credit will not be granted in this examination.

GENERAL INFORMATION

It is the candidate's responsibility to contact the Franchise Tax Board, Exam Section, (916) 845-3608, three days prior to the written test date if he/she has not received his/her notice.

For an examination without a written feature it is the candidate's responsibility to contact the Franchise Tax Board, Exam Section, (916) 845-3608, three weeks after the final filing date if he/she has not received a progress notice.

If a candidate's notice of oral interview or performance test fails to reach him/her prior to the day of the interview or performance test due to a verified postal error, he/she will be rescheduled upon written request.

Applications are available at the Franchise Tax Board, local offices of the Employment Development Department and the State Personnel Board office.

If you meet the requirements stated on the reverse, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination described on the other side of this bulletin will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

The Franchise Tax Board reserves the right to revise the examination plan to better meet the needs of the service if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all competitors will be notified.

Examination Locations: When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. Ordinarily, oral interviews are scheduled in Sacramento, San Francisco, and Los Angeles. However, locations of interviews may be limited or extended as conditions warrant.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) subdivisional promotional, 2) departmental promotional, 3) multidepartmental promotional, 4) servicewide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in from one to four years unless otherwise stated on this bulletin.

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, an investigation may be made of employment records and personal history and fingerprinting may be required.

Interview Scope: If an interview is conducted, in addition to the scope described on the other side of this bulletin, the panel will consider education, experience, personal development, personal traits, and fitness. In appraising experience, more weight will be given to the breadth and recency of pertinent experience and evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of his/her experience. Evaluation of a candidate's personal development will include consideration of his/her recognition of his/her own training needs; his/her plans for self-development; and the progress he/she has made in his/her efforts toward self-development.

Veterans Preference: California law limits the granting of veterans preference credits to entrance examinations. When credit is granted it is as follows: 10 points for veterans, widows or widowers of veterans, and spouses of 100% disabled veterans; and 15 points for disabled veterans. Directions for applying for veterans preference are on the Veterans Preference Application form which is available from State Personnel Board office or written test proctors.

High School Equivalence: Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college-level work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; or 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.

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